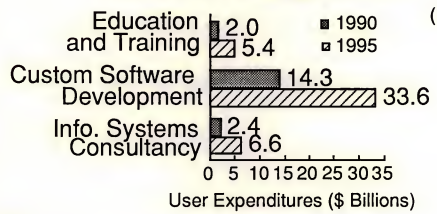
Western Europe, 1990-1995

Professional Services Market Segments



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Professional Services, Western Europe

Leading Vendors, 1989

Rank	Vendor	Market Share (Percent)
1	IBM	5
2	CAP Gemini Sogeti	5
3	Finsiel	2
4	Sema	2
5	Andersen Consulting	2

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Western European Vendor Selection Criteria

	IS Mgmt.	General Mgmt.
Proven Delivery Capability	8.6	8.4
Technical Staff	8.2	8.7
Performance Guarantee	8.8	8.1

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Vendor Selection Criteria

	IS Mgmt.	General Mgmt.
Industry Knowledge	8.0	8.0
System Support	7.4	7.8
Price	6.9	6.6
Project Responsibility	6.2	6.9

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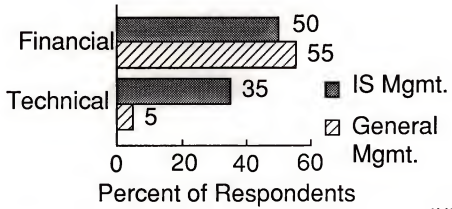
Western European Constraints on New Project Development



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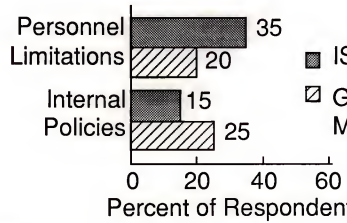
Western European Constraints on New Project Development



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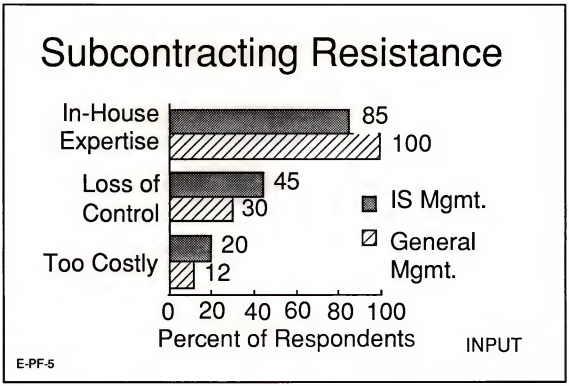

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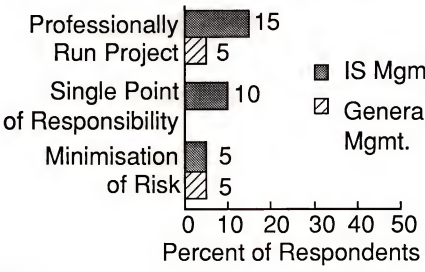
Benefits from Contracting



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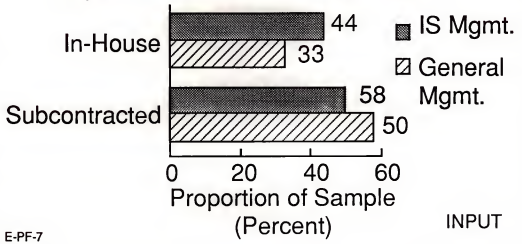
Western European Major Systems Development



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Application Maintenance Sources (Percent)

	In-House	Equip. Vendor	SW Vendor	Prof. Serv. Vendor
Germany	45	30	20	-
France	35	45	5	15
U.K.	40	20	10	25
Italy	50	10	35	5

E-PF-8 Sample Error ±5%

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Professional Services Markets

- Business cultures
- Consultancy and software development/maintenance
- Systems integration
- Systems operations

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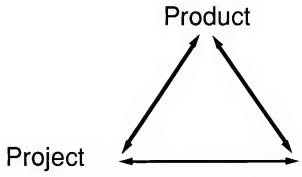
Conflicting Business Cultures



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Professional Services Market
Western Europe

Subsector	$ Billions 1991	'91-'96 CAGR (%)	1996
Consulting	3.3	17	7.1
Educ. and Training	2.6	14	5.1
Software Develop.	18.8	16	39.7

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Migrating to Standards

Skills Shortages Create Service Opportunities

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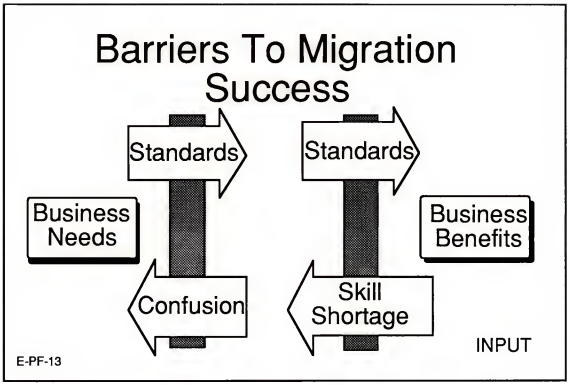

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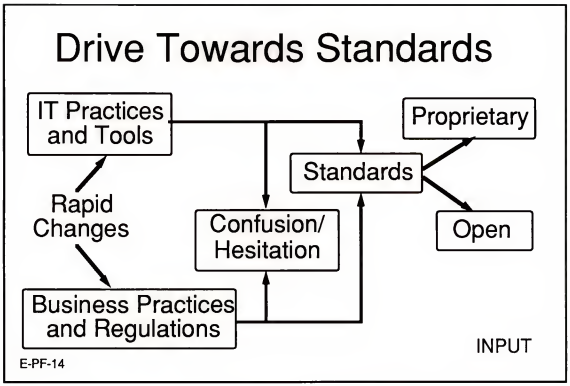

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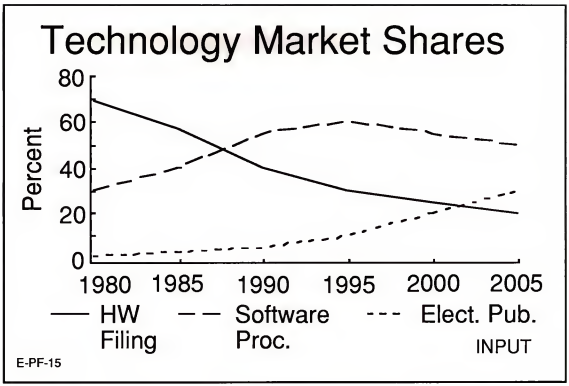

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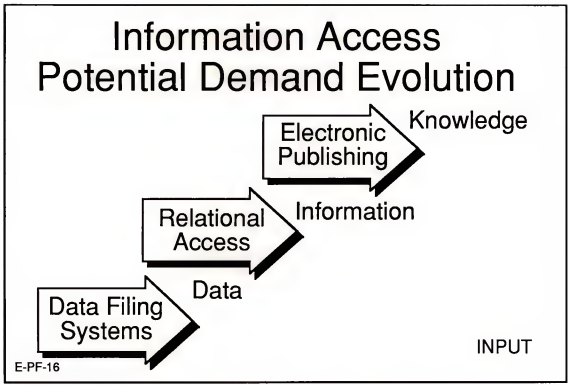

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Distributed Data Types

Records	Accounting	**Graphics**	Charts
	Inventory		Maps
	Sales		Drawings
Text	Notes	**Images**	Facsimile
	Letters		Video
	Documents		Pictures

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Distributed Data Types

Voice	Messages	**Other**	Programs
	Annotations		Knowledge Rules
	Response		Metadata

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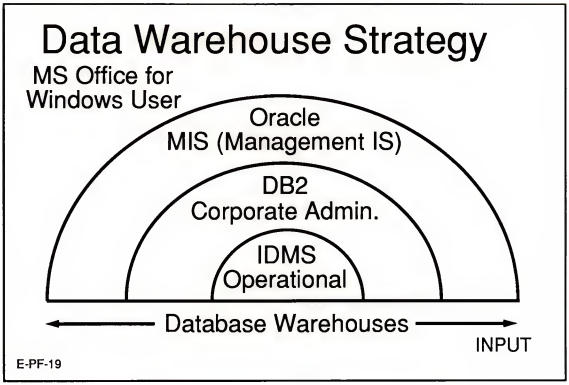

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Software Standards A Benefits Case Study

- Scalable duplicate applications
- Data centre consolidation
- Improved customer information
- Efficient in-house development
- Minimised duplicate efforts
- Real time executive information

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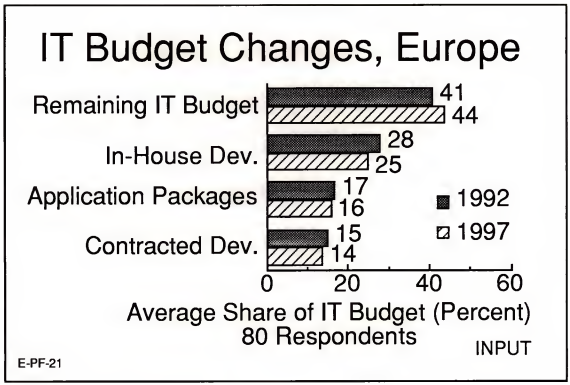

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Recommended Migration Services

- Staff training
- Specialist consultancy
- Development projects
- Migration support
- Integration projects
- Software maintenance
- Systems operations

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The Key Industry Trends

- Revolution
- Metamorphosis
- Migration

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